

Message Text

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ACTION AF-10

INFO OCT-01 EUR-12 IO-13 ISO-00 SOE-01 AID-05 CEA-01
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FM AMEMBASSY PRETORIA
TO SECSTATE WASHDC 9984
INFO AMEMBASSY GABORONE
AMEMBASSY LONDON
AMEMBASSY LUSAKA
AMEMBASSY MASERU
AMEMBASSY MBABANE
AMCONSUL CAPE TOWN
AMCONSUL DURBAN
AMCONSUL JOHANNESBURG
USMISSION USUN NEW YORK

C O N F I D E N T I A L PRETORIA 6994

E.O. 11652: GDS
TAGS: ETRD, UNSC, SF, LT, BC, WZ
SUBJECT: OIL SANCTIONS

REF: STATE 296906,

SUMMARY: IN RESPONSE TO THE DEPARTMENT'S INQUIRY, THIS MESSAGE
DESCRIBES TO THE EXTENT POSSIBLE THE SHIPPING PATTERNS OF POL
PRODUCTS BY THE FOUR REFINERIES IN SOUTH AFRICA. END SUMMARY

1. REGRETFULLY, WE ARE UNABLE TO BE OF HELP ON TYPES AND
QUANTITIES OF PETROLEUM PRODUCTS SHIPPED TO SWAZILAND AND
BOTSWANA. HOWEVER, REPORTS SENT BY OUR EMBASSIES IN THOSE
COUNTRIES ON POL USAGE SHOULD REFLECT APPROXIMATE IMPORTS FROM
SOUTH AFRICA. REGARDING DEPARTMENT'S QUERY ON SHIPPING PATTERNS,
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FOLLOWING DATA ASSEMBLED BY RESOURCES OFFICER IN JOHANNESBURG IS
PROBABLY MOST SPECIFIC WE CAN OBTAIN IN VIEW OF FACT SUCH
INFORMATION IS CLASSIFIED AND DISCLOSURE IS SUBJECT TO HEAVY
PENALTY.

2. JOHANNESBURG'S 1/A11, FEB. 4, 1976, GAVE CAPACITIES OF
THE FOUR REFINERIES IN SOUTH AFRICA. IN SUMMARY THEY ARE:

(A) SAPREF IN DURBAN, OWNED BY SHELL AND BP WITH INSTALLED CAPACITY OF 53.90 MLN BBLs ANNUALLY; (B) MOBIL IN DURBAN AT 31.50 MLN BBLs; (C) CALTEX NEAR CAPE TOWN AT 21.35 MLN BBLs, AND (D) NATIONAL REFINERIES OF SA (NATREF) OWNED BY SASOL, TOTAL AND NIOC AT SASOLBURG WITH CAPACITY OF 17.50 MLN BBLs. EXPANSION OF CALTEX REFINERY SCHEDULED FOR LATE 1978 WILL INCREASE ITS CAPACITY FROM 61,000 TO 105,000 BBLs/DAY.

3. TOTAL INSTALLED CAPACITY IS 124.25 MLN BBLs AND ANNUAL CRUDE OIL THROUGHOUT AVERAGES ABOUT 120 MLN BBLs AFTER YEARLY TURN AROUNDS. OF THIS TOTAL, APPROXIMATELY 115.66 MILLION BBLs ARE IMPORTED, WHILE 4.38 MILLION BBLs REPRESENT SASOL-PRODUCED SYNTHETIC (COAL-TO-OIL) CRUDE. THE BULK OF THE CRUDE PRODUCED AT SASOL IS CURRENTLY DIRECTED TOWARD DOWNSTREAM PETRO-CHEMICAL PRODUCTS, THE BIG MONEY-MAKER FOR SASOL. UNDER EMERGENCY CONDITIONS, HOWEVER, IT WOULD BE PRUDENT TO ASSUME THAT THE BASIC POL OUTPUT COULD BE SHARPLY INCREASED TO AN ESTIMATED 65 PERCENT OF NATREF'S INSTALLED CAPACITY FOR GASOLINE AND KEROSENE PLUS AN UNKNOWN AMOUNT OF DIESEL.

4. THUS, OVER 96 PERCENT OF ALL CRUDE CONSUMED IN SOUTH AFRICA IS IMPORTED, AND OF THIS TOTAL WE NOW BELIEVE OVER 90 PERCENT ORIGINATES FROM IRAN'S AGHA JARI FIELD, OWNED AND OPERATED UNDER A CONSORTIUM CONSISTING OF IRAN AND BP, SHELL, GULF, MOBIL, STANDARD OF CALIFORNIA, STANDARD OF NEW JERSEY, COMPAGNIE FRANCAISE DES PETROLES (TOTAL) AND IRICON AGENCY LTD. OF LONDON. CONFIDENTIAL

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(IN RECENT REPORTING WE HAVE ESTIMATED THAT IRAN SUPPLIED 80 PERCENT OF SOUTH AFRICA'S OIL. A RELIABLE SOURCE NOW INSISTS IRAN'S SHARE IS 90 PERCENT.)

5. SOUTH AFRICA'S CRUDE OIL THROUGHPUT IN MILLION BARRELS ANNUALLY OF MAJOR PRODUCTS BY ALL REFINERIES IS: MOTOR GASOLINE, 17.9; AVIATION GASOLINE, 2.4; KEROSENE, 13.6; AVIATION TURBINE FUEL, 4.8; HIGH SPEED DIESEL, 29.0; LIGHT DIESEL, 21.1; FUEL OIL, 28.2; AND LIBRICANTS AND GREASES, 3.0.

6. SHELL AND BP ARE, SEPARATELY, WHOLESALE POL MARKETERS IN NATAL, TRANSVAAL, LESOTHO, TRANSKEI, SWAZILAND AND BOTSWANA. PRODUCTS DESIGNATED FOR NATAL, TRANSVAAL, LESOTHO AND TRANSKEI MOVE BY RAIL AND TRUCK. DISTRIBUTION TO SWAZILAND AND BOTSWANA IS HANDLED BY COASTAL TANKER TO MAPUTO AND THENCE BY RAIL TO EACH OF THESE COUNTRIES.

7. MOBIL'S SHIPPING PATTERN IS SIMILAR TO SHELL AND BP, SHARING THE SAME WHOLESALE SALES TERRITORY. PRODUCT TRADES ARE COMMON ON AN "AS NEEDED" BASIS, AND MARKETED UNDER THE NAME OF THE RETAIL SALES OUTLET THAT PURCHASES THE PRODUCTS.

8. CALTEX, IN CAPE TOWN AREA, MARKETS THE BULK OF ITS POL IN CAPE PROVINCE, ORANGE FREE STATE AND, PRESUMABLY, NAMIBIA, THOUGH HERE AGAIN PRODUCT TRADES TAKE PLACE. NAMIBIAN SHIPMENT PATTERNS ARE NOW KNOWN PRECISELY, BUT ARE THOUGHT TO MOVE TO THE NORTHERN PART OF THE AREA VIA COASTAL TANKES AND THENCE INLAND BY RAIL AND TRUCK, AND TO THE SOUTH BY RAIL AND TRUCK.

9. NATREF PRODUCTS ARE SOLD IN ORANGE FREE STATE, CAPE PROVINCE, NATAL, TRANSVAAL, LESOTHO AND TRANSKEI UNDER SASOL AND TOTAL BRAND NAMES. PRODUCT TRADES EXIST WITH NATREF PRODUCTS ALSO, TO KEEP THE RETAIL PUMPS FULL, AND ARE THOUGHT TO INCLUDE EXPORTS TO BOTSWANA. A PIPELINE CARRIES AVIATION FUEL FROM SASOLBURG TO JAN SMUTS AIRPORT.
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10. FINALLY, ESSO AND CASTROL, NEITHER OF WHICH ARE REFINERS OF CRUDE IN SOUTH AFRICA, MARKET POL PRODUCTS COUNTRYWIDE UNDER THEIR OWN NAMES, AND, ADDITIONALLY, ARE WHOLESALE MARKETERS OF SPECIAL PRODUCTS INCLUDING OILS, GREASES AND AROMATICS TO A VARIETY OF RETAIL SALES OUTLETS UNDER THEIR OWN BRAND NAMES, AND OTHERS, ON A CONVENIENCE BASIS.BOWDLER

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